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SUBJECT: OECD ECONOMIC AND DEVELOPMENT REVIEW COMMITTEE
(EDRC) REVIEW OF NORWAY

REF: EDR(76)31

1. SUMMARY: IN REFDOC CIRCULATED FOR DECEMBER 17 EDRC
REVIEW OF NORWAY, SECRETARIAT STATES THAT GON DEMAND
MANAGEMENT POLICIES IN 1976 WERE FORMULATED ON THE
ASSUMPTION THAT DOMESTIC DEMAND WOULD BE WEAK IN 1976
WHILE EXPORT-LED EXPANSION WOULD BEGIN IN SECOND HALF OF
YEAR. THUS, DEMAND MANAGEMENT POLICIES AIMED AT MAIN-
TAINING FULL EMPLOYMENT, WITH THE TASK OF CONTROLLING
INFLATION LEFT TO INCOMES POLICIES. IN CONTRAST TO
PREVIOUS OFFICIAL PROJECTIONS, FINAL DOMESTIC DEMAND IS
NOW EXPECTED TO RISE RAPIDLY AND REAL FOREIGN BALANCE
TO DETERIORATE. SECRETARIAT EMPHASIZES, HOWEVER, THAT
BECAUSE OF PROSPECT OF RISING OIL REVENUES NEITHER THE
SHARP INCREASE IN THE CURRENT ACCOUNT DEFICIT IN 1975
AND ITS EXPECTED FURTHER WIDENING IN 1976, NOR THE RISE
IN THE PUBLIC-SECTOR DEFICIT, WERE CONSIDERED BY GON AS
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CONSTRAINTS ON AVAILABLE POLICY OPTIONS. FOR 1977,

SECRETARIAT FORECASTS MODERATE GROWTH OF DOMESTIC DEMAND, IMPROVEMENT IN REAL FOREIGN BALANCE AND IN CURRENT ACCOUNT POSITION, SOME ACCELERATION IN INFLATION, AND 7-8 PERCENT INCREASE IN REAL GDP. IN LIGHT OF RELATIVELY (COMPARED TO OTHER OECD COUNTRIES) LOW UNEMPLOYMENT RATE, BUT STILL HIGH INFLATION, LIKELY TO OBTAIN IN NORWAY NEXT YEAR, SECRETARIAT RECOMMENDS (A) GRADUALLY DIMINISHING FISCAL STIMULUS AND TIGHT MONETARY POLICY; (B) CONTINUATION (BUT WITH CAUTION) OF GON TECHNIQUE OF SECURING MODERATION OF NOMINAL WAGE INCREASES BY OFFERING TAX CUTS AND/OR INCREASED SUBSIDIES; (C) MEASURES, INCLUDING MORE ACTIVE USE OF INTEREST-RATE VARIATIONS, TO IMPROVE EFFECTIVENESS OF MONETARY POLICY. ACTION REQUESTED: PARTICULARLY SINCE U.S. IS AN EXAMINING COUNTRY, MISSION WOULD APPRECIATE COMMENTS/QUESTIONS WHICH COULD BE USEFULLY POSED AT REVIEW. FOR OSLO: MISSION WOULD WELCOME EMBASSY COMMENTS ON SECRETARIAT ANALYSIS AND CONCLUSION. END SUMMARY.

2. SHORT-TERM PROSPECTS; DOMESTIC OUTLOOK: SECRETARIAT NOTES THAT GON DEMAND MANAGEMENT POLICY STANCE FOR 1976 WAS SET IN AUTUMN OF 1975 UNDER ASSUMPTION THAT GROWTH OF DOMESTIC DEMAND WOULD BE WEAK (2.7 PERCENT) DURING YEAR, BUT THAT GDP GROWTH (EXPORT LED) WOULD ACCELERATE IN SECOND HALF. IN FACT, HOWEVER, BOTH GON AND SECRETARIAT NOW ESTIMATE THAT DOMESTIC DEMAND WILL INCREASE BY ABOUT 6 PERCENT IN 1976, BUT THAT WEAKER-THAN-EXPECTED IMPROVEMENT IN REAL FOREIGN BALANCE WILL HOLD REAL GDP GROWTH TO 5-6 PERCENT (VS INITIAL OFFICIALLY-FORECASTED OUTCOME OF 7 PERCENT). BUOYANT DOMESTIC DEMAND, EFFECT OF SELECTIVE EMPLOYMENT MAINTENANCE MEASURES, AND INCREASE IN PUBLIC-SECTOR EMPLOYMENT CONTRIBUTED TO FALL IN UNEMPLOYMENT RATE IN 1976.

3. DESPITE 17-18 PERCENT INCREASE IN HOURLY EARNINGS, COST PRESSURE FROM WAGE SIDE WAS MODERATED BY RAPID (ESTIMATED BY SECRETARIAT AT 8 PERCENT) INCREASE IN PRODUCTIVITY. DECELERATION IN INFLATION RATE WAS MARKED DURING 1976, BUT SECRETARIAT OBSERVES THAT PRICE FREEZE AND HIGHER SUBSIDIES IN SECOND HALF OF YEAR, LIMITED OFFICIAL USE

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RATHER THAN FALL IN UNDERLYING RATE OF INFLATION, ARE MAJOR FACTORS EXPLAINING DECELERATION.

4. OUTLOOK FOR 1977: AFTER RAPID RISE IN 1976, SECRETARIAT FORECASTS SLOWDOWN OF DOMESTIC DEMAND GROWTH TO 3 PERCENT IN 1977, WITH IMPLICATION THAT ONLY MINIMAL FURTHER PROGRESS WILL BE MADE IN REDUCING UNEMPLOYMENT RATE. SECRETARIAT FORECASTS DECELERATION IN GROWTH OF

ALL COMPONENTS OF DOMESTIC DEMAND, AND ADDS THAT WHILE INVESTMENT IN OIL SECTOR COULD RISE BY 2 PERCENT OR MORE IN 1977, REAL INVESTMENT IN SHIPPING COULD FALL BY AS MUCH AS 20 PERCENT (VS 6 PERCENT RISE IN 1976). IN CONTRAST TO DEVELOPMENTS DURING 1976, SECRETARIAT FORE-

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CASTS IMPROVEMENT IN REAL FOREIGN BALANCE IN 1977 (4 PERCENT CONTRIBUTION TO REAL GDP GROWTH, LARGELY DUE TO EXPECTED DOUBLING OF OIL AND GAS PRODUCTION) SO THAT REAL GDP SHOULD EXPAND BY ABOUT 7-8 PERCENT.

5. SECRETARIAT STRESSES THAT WAGE/PRICE OUTLOOK FOR 1977 DEPENDS IMPORTANTLY ON OUTCOME OF SPRING, 1977 WAGE ROUND. SECRETARIAT NOTES THAT GON TECHNIQUE OF OFFERING TAX CONCESSIONS AND/OR INCREASED SUBSIDIES IN RETURN FOR MODERATION IN WAGE DEMANDS HAS BEEN EFFECTIVE IN PAST, AND THAT OFFICIAL GOAL OF HOLDING INCREASE IN HOURLY EARNINGS TO 10.5 PERCENT COULD POSSIBLY BE REALIZED. SECRETARIAT NOTES THAT PROJECTED MODERATE GROWTH IN EXPORT/IMPORT PRICES SHOULD HELP REDUCE PRESSURE FOR WAGE INCREASES, BUT ALSO POINTS TO FOLLOW-

ING RISKS: (A) LARGE INCREASES IN FARM INCOMES AND IN TRANSFERS IN 1976 COULD LEAD TO STRUGGLE FOR INCOME SHARES IN 1977 AS WAGE EARNERS ATTEMPT TO "CATCH UP"; (B) PRODUCTIVITY IS NOT LIKELY TO GROW RAPIDLY; (C) INFLATION WILL PROBABLY ACCELERATE FOLLOWING EXPIRATION AT END OF 1976 OF "TEMPORARY-PARTIAL" PRICE FREEZE. WHILE EXPRESSING JUDGMENT THAT GON FORECAST FOR HOURLY LIMITED OFFICIAL USE

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EARNINGS INCREASES MAY BE ON LOW SIDE, SECRETARIAT FEELS THAT OFFICIAL PROJECTION OF 8-9 PERCENT INCREASE IN CONSUMER PRICES IN 1977 IS IN BALLPARK.

6. CURRENT ACCOUNT: SECRETARIAT ESTIMATES THAT NORWEGIAN CURRENT ACCOUNT DEFICIT WILL WIDEN TO \$3.5 BILLION (11 PERCENT OF GDP) IN 1976 FROM \$2.38 BILLION IN 1975, AND EXPLAINS THIS DEVELOPMENT AS FOLLOWS: (A) GROWTH OF EXPORT VOLUMES IN TRADITIONAL SECTORS DECELERATED IN LINE WITH SLOWDOWN IN WORLD TRADE; (B) TECHNICAL PROBLEMS KEPT OIL AND GAS PRODUCTION 15 PERCENT BELOW PREDICTED LEVELS, AND NET REAL FREIGHT EARNINGS DECLINED; (C) COMPOSITION OF TOTAL DOMESTIC DEMAND SHIFTED TOWARD RELATIVELY IMPORT-INTENSIVE SECTORS; (D) EXPECTED IMPROVEMENT IN TERMS OF TRADE DID NOT COME ABOUT. SECRETARIAT INDICATES, HOWEVER, THAT EXTERNAL DEFICIT OF "MAINLAND NORWAY" (MINUS SHIPPING AND OIL) IS LESS THAN ONE QUARTER OF THE TOTAL DEFICIT. FOR 1977, SECRETARIAT FORESEES REDUCTION OF CURRENT ACCOUNT DEFICIT TO \$2.87 BILLION, PARTLY ON BASIS OF DRAMATIC INCREASE IN OIL AND GAS EXPORTS, VALUE OF WHICH COULD ATTAIN 30 PERCENT OF TOTAL MERCHANDISE EXPORTS. SECRETARIAT ALSO FORECASTS SHARP DROP IN EXPORTS OF SHIPS AND OIL RIGS, BUT NOTES THAT DECLINE IN SHIPPING INVESTMENT WILL HELP REDUCE GROWTH OF IMPORTS. FINALLY, SECRETARIAT PROJECTS 5 PERCENT GROWTH OF TRADITIONAL EXPORTS VOLUMES, 8 PERCENT GROWTH OF TRADITIONAL IMPORT VOLUMES, AND SOME IMPROVEMENT IN TERMS OF TRADE.

7. ECONOMIC POLICY: AS NOTED ABOVE (PARA 2), MONETARY AND FISCAL POLICY WERE SET IN AUTUMN OF 1975 IN EXPECTATION THAT DOMESTIC DEMAND WOULD BE WEAK DURING 1976. IN ADDITION, GON PLANNED TO TIGHTEN MONETARY POLICY AT MID-YEAR TO LEAN AGAINST EXPECTED ACCELERATION OF GDP GROWTH. SECRETARIAT FEELS THAT FISCAL POLICY STANCE PLANNED BY GON FOR 1977 IS ONLY NOMINALLY RESTRICTIVE, SINCE PROJECTED STRONG GROWTH IN REVENUES IS LARGELY DUE TO ANTICIPATED INCREASE IN OIL AND GAS PRODUCTION, AND THUS WILL HAVE LITTLE RESTRAINING INFLUENCE ON DOMESTIC ECONOMY. IF OIL REVENUES ARE EXCLUDED,

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NET IMPACT OF FISCAL POLICY WILL, IN SECRETARIAT VIEW,
BE EXPANSIONARY -- ALTHOUGH STIMULATIVE EFFECT LIKELY
TO DECLINE DURING THE YEAR.

8. SECRETARIAT NOTES THAT REDUCED FISCAL POLICY FLEXI-
BILITY BROUGHT ABOUT BY GON PRACTICE OF INDUCING WAGE
RESTRAINT THROUGH TAX CUTS AND/OR SUBSIDIES HAS SHIFTED
BURDEN OF DEMAND MANAGEMENT TOWARD MONETARY POLICY,
AND THAT MONETARY POLICY TOOLS ARE NOT EQUAL TO THE TASK.
CONTROL OF MONEY SUPPLY IN 1977 WILL ALSO BE HINDERED
BY EXCESSIVE BUILDUP OF LIQUIDITY IN FIRST HALF OF 1976
AND BY SIGNIFICANT INCREASE IN PUBLIC-SECTOR BORROWING
REQUIREMENT (RELATED TO HIGHER LOAN COMMITMENTS BY
STATE BANKS). SECRETARIAT STATES GON IS COUNTING ON
REDUCTION IN EXTERNAL BORROWING IN 1977 IN ORDER FOR
TOTAL CREDIT EXPANSION TO REMAIN WITHIN TARGETED BOUNDS
(14 PERCENT - 16 PERCENT).

9. BASED ON ANALYSIS REFD0C, SECRETARIAT SUGGESTS THAT
EDRC REACH FOLLOWING MAIN CONCLUSIONS:

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(A) POLICY APPROACH COMBINING DEMAND MANAGEMENT AND INCOMES POLICIES HAS PLAYED AN IMPORTANT ROLE IN SUSTAINING TOTAL DEMAND AND EMPLOYMENT AND IN REDUCING INFLATION;

(B) IN VIEW OF THE LARGELY ONCE-AND-FOR-ALL NATURE OF THE HIGH PRODUCTIVITY GAINS RECORDED IN 1976, THERE IS NEED FOR CONTINUED EFFORTS TO RESTRAIN GROWTH OF NOMINAL WAGES. IN THIS CONTEXT IT IS ALSO IMPORTANT THAT THE POLICY MIX ADOPTED FOR REDUCING WAGE CLAIMS AND RAISING REAL DISPOSABLE INCOMES DOES NOT UNDULY REDUCE THE SCOPE FOR TIMELY FISCAL AND MONETARY POLICY CHANGES. MOREOVER, MEASURES TO INCREASE THE EFFECTIVENESS OF MONETARY POLICY WOULD BE DESIRABLE. (SECRETARIAT IMPLIES THAT MORE ACTIVE USE OF INTEREST RATE CHANGES WOULD BE APPROPRIATE;

(C) ALTHOUGH THE CURRENT ACCOUNT DEFICIT SHOWED UNEXPECTEDLY LARGE INCREASE IN 1976, AND IN LIMITED OFFICIAL USE

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TERMS OF GDP IS ONE OF THE HIGHEST IN THE OECD AREA, THE BALANCE OF PAYMENTS SHOULD NOT BE A MATTER OF CONCERN GIVEN THE PROSPECTIVE SHARP RISE IN EXPORTS OF OIL AND GAS OVER THE MEDIUM TERM.

10. COMMENTS: (A) WHILE NOT TAKING STRONG POSITION AGAINST SECRETARIAT CONCLUSION THAT BOTH DEMAND MANAGEMENT AND INCOMES POLICIES HAVE IN PAST CONTRIBUTED TO MAINTENANCE OF HIGH EMPLOYMENT AND TO REDUCTION OF INFLATION, MISSION WOULD NOTE THAT 17-18 PERCENT INCREASE IN HOURLY EARNINGS (EVEN THOUGH POSSIBLY INFLUENCED BY FALL IN HOURS) COULD HARDLY BE CALLED AN INCOMES POLICY SUCCESS. MISSION WOULD ADD THAT RESTRAINT OF WAGES IN FUTURE THROUGH INCOMES POLICY HAS LITTLE CHANCE OF SUCCESS IF DEMAND MANAGEMENT POLICY IS NOT PRUDENT, SINCE TOO RAPID AN OVERALL EXPANSION COULD LEAD TO SECTORAL BOTTLENECKS AND RAPID SPREAD OF WAGE/PRICE INFLATION; (B) IN THIS CONNECTION, MISSION WOULD AGREE WITH SECRETARIAT VIEW THAT, OVER TIME, TAX/

WAGE BARGAINING CAN REDUCE FISCAL POLICY FLEXIBILITY. HOWEVER, MISSION WOULD RAISE QUESTION AS TO WHY SECRETARIAT HAS ISSUED THIS CAVEAT IN NORWEGIAN CASE BUT HAS RECOMMENDED TAX BARGAINING (WITHOUT QUALIFICATION) TO COUNTRIES WHERE GOVERNMENTS HAVE MUCH LESS FISCAL FLEXIBILITY THAN DOES GON; (C) SECRETARIAT ESTIMATE OF 8 PERCENT INCREASE IN PRODUCTIVITY IN 1976 DEPENDS ON ASSUMPTION THAT REDUCTION IN AVERAGE WORK-WEEK WAS REFLECTED IN ACTUAL FALL IN HOURS WORKED (AND NOT OFFSET BY INCREASED OVERTIME). THIS WOULD APPEAR TO BE A RATHER EXTREME ASSUMPTION. HENCE, IT IS PROBABLE THAT PRODUCTIVITY ROSE BY LESS THAN 8 PERCENT THIS YEAR AND THAT NORWEGIAN RELATIVE COST POSITION MAY BE WORSE THAN IMPLIED BY SECRETARIAT ANALYSIS. IN RELATION TO THIS, MISSION WOULD ASK NORWEGIAN DEL FOR EXPLANATION AS TO WHY INCOME ELASTICITY OF IMPORTS ROSE SHARPLY THIS YEAR AND IS EXPECTED TO RISE FURTHER IN 1977. MOREOVER, INSOFAR AS EXPECTATION OF RISING IMPORT ELASTICITY REFLECTS WORSENING RELATIVE COST POSITION OF NORWAY, THIS WOULD APPEAR TO BE INCONSISTENT WITH SECRETARIAT'S ASSUMPTION THAT NORWAY WILL MAINTAIN SHARES IN TRADILIMITED OFFICIAL USE

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TIONAL EXPORT MARKETS IN 1977; (D) WHEREAS GON HAD FORECAST 50 PERCENT DROP IN SHIPPING INVESTMENT IN 1976, 6 PERCENT INCREASE IS NOW EXPECTED. SECRETARIAT NOTES THAT SHIPOWNERS USED FUNDS PROVIDED BY TEMPORARY GUARANTEE INSTITUTE PRIMARILY FOR NEW INVESTMENT IN SHIPS RATHER THAN FOR ASSISTANCE IN CASE OF CANCELLED ORDERS. UNLESS GON EXPECTS MAJOR TURNAROUND IN INTERNATIONAL SHIPPING MARKET, IT DOES NOT SEEM APPROPRIATE TO SUBSIDIZE INVESTMENT IN SHIPS. MISSION WOULD RAISE THIS QUESTION AT EDRC: (E) ACCORDING TO INVESTMENT SURVEY CONDUCTED IN AUGUST, CURRENT PLANS IN OIL SECTOR POINT TO 100 PERCENT INCREASE IN INVESTMENT SPENDING (CURRENT DOLLARS) IN 1977 OVER 1976 LEVELS. GON FORECASTS INCREASE OF ONLY 2 PERCENT. MISSION WOULD EXPLORE REASONS FOR THIS DISCREPANCY.
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